DECEMBER 10, 1990
A BILL PUBLICATION

RB
RESTAURANT BUSINESS

Who's Coming To Dinner?

Presidents Forecast For '91

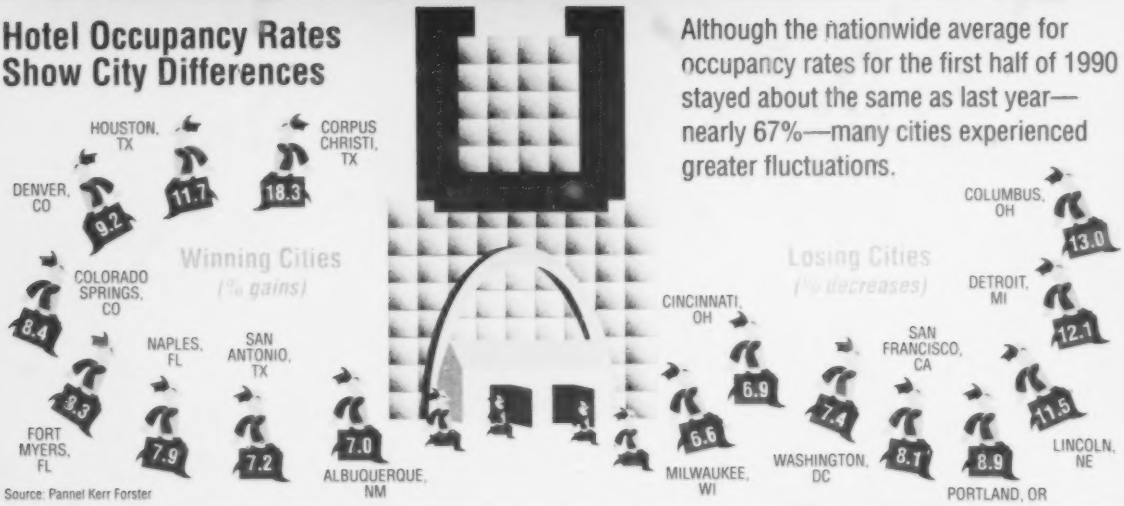
BUSINESS BAROMETER

Mail-Order Foods Small But Growing Market

Sales of mail-order foods is growing about 10% annually. However, it is still a relatively small segment of the direct marketing industry; less than 2% of the U.S. population buys food by mail.

Hotel Occupancy Rates Show City Differences

Although the nationwide average for occupancy rates for the first half of 1990 stayed about the same as last year—nearly 67%—many cities experienced greater fluctuations.



Food Spending Impacted by Age

The average American household spent $4,017 on food and alcoholic beverages in 1988—16% of the total household budget. But spending on food varies widely by age. The biggest food spenders are between 35 and 54.

Average Annual Expenditures *(by age)*

	At home	*Away from home*
under 25	$1,121	$1,334
25-34	2,046	1,618
35-44	2,599	2,037
45-54	2,605	2,210
55-64	2,355	1,597
65-74	1,933	1,081

Charts by Peter K. Niceberg

Source: American Demographics, Bureau of Labor Statistics

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DECEMBER 10, 1990 VOL. 89, NO. 18

COVER STORY

PRESIDENTS FORECAST WHAT'S AHEAD IN '91. Cautious growth, the economy, and shifting priorities were the keynotes sounded as 10 top foodservice executives examined the issues of the rapidly approaching new year and beyond for the restaurant industry. *RB*'s ninth annual Presidents Forecast Roundtable, held at the Waldorf-Astoria in New York City, brought together leaders from every industry segment Although the outlook they present is sobering, there will be opportunities for well-managed companies to grow. **99**

FEATURES

INDUSTRY ISSUE INSURANCE. For at least one part of a restaurateur's insurance needs, there is good news. Liability insurance—for some establishments—has become easier to obtain and considerably less expensive than it was even two years ago. Because the insurance business has become more competitive, policy prices have gone down and availability has increased. In addition, the courts are generally looking less favorably on third-party liability, which is where restaurant operators have traditionally been hurt. **74**

INDEPENDENT STAR MANGIA. At first glance, the small, blue-collar enclave of Kenosha, WI, seems a surprising location for Mangia, a casual Italian trattoria with a sophisticated, yet homey feel. Tony and Gino Mantuano are betting that a $350,000 renovation and expansion can transform a tiny 44-seat pizza and pasta cafe into a high-profile dining spot **81**

INDEPENDENT STAR YUCA. Capitalizing on the root vegetable's Latin popularity and identifying a niche for a white-tablecloth Cuban restaurant in Miami, Efrain Veiga opened his 80-seat Yuca restaurant in Miami's elegant Coral Gables area. **86**

MULTIUNIT OPERATOR GUIDO BELLANCA. This restaurateur is pretty serious about pasta—particularly when it comes to fettuccine Alfredo. This is not surprising, considering that, as the owner of three Alfredo the Original of Rome restaurants in the U.S., Bellanca has made his reputation serving the authentic fettuccine Alfredo. **93**

MARKET SEGMENT REPORT SANDWICH. Low start-up costs for sandwich shops as well as growing interest in hand-held items, convenience, and customer health perceptions have encouraged growth **115**

Cover illustration by David Shannon

Published 18 times a year by Restaurant Business Magazine, (ISSN 0097-8043), 633 Third Ave., New York, NY 10017 Vol. 89 No. 18. Second Class Postage paid at New York, NY and additional office (USPS 917-180). Postmaster please send address changes to Restaurant Business, P.O. Box 5309, Grand Central Station, New York, NY 10017.

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MENU IDEAS DOWNHOME DIXIE DESSERTS. Mary Wiggins at Buntyn Restaurant in Memphis serves desserts that have captured an almost cultlike following. 147

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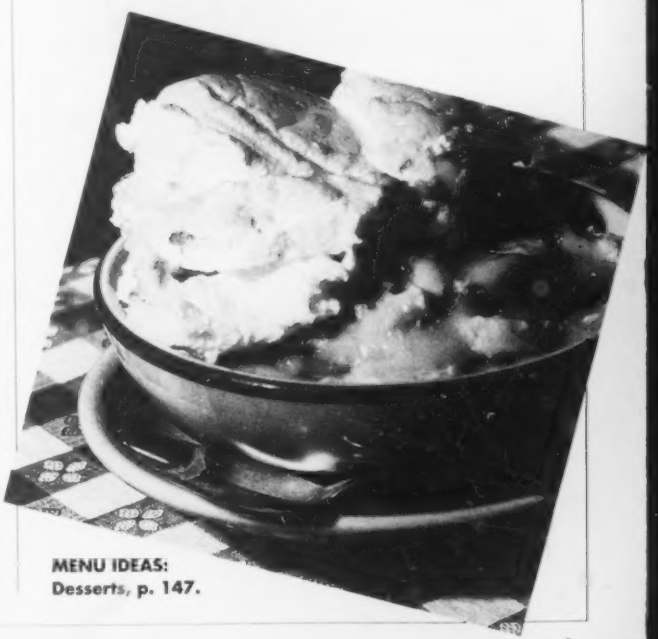
IN THE NEXT ISSUE

COVER STORY: COST CUTTING IN THE '90s. The rules of the game are changing. In order to maintain profit margins and curtail shrinking check averages, operating costs have to come down. Operator Bill Main, owner of The Shore Bird in Princeton-By-The-Sea, CA, will take a look at the cost of marketing, food, labor, utilities, real estate, and waste. West Coast Editor Kevin Farrell will provide an operator round-up that will include interviews with both chains and independents and will detail what they're currently doing or plan to do to cut costs.

MARKET SEGMENT REPORT: HAMBURGER. Though the all-American hamburger remains a patron favorite, the heavy hitters in this segment have found that the way to increase profit margins is through menu diversification. At the same time, small regional chains continue to vie for market share with streamlined menus.

DRAFTS, CARAFES & SPIRITS: WORLD CLASS WHISKIES. Blue-chip spirits provide exciting merchandising opportunities and profit margins to ring in the New Year.



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RESTAURANT BUSINESS Magazine (formerly FAST FOOD) (ISSN 0097-8043) is published 18 times a year by Bill Communications, Inc., 633 Third Ave., New York, NY 10017. Telephone: 212-986-4800. Copyright © 1990 by Bill Communications, Inc. All rights reserved. Subscriptions in the U.S. $79; foreign and Canada, $114; air mail, $212. Single copies in the U.S. and Canada $7. Second class postage paid at New York, NY, and at additional offices. Postmaster: Send address corrections to Restaurant Business, Attention: Roseanne Walsh, Circ. Dept., 633 Third Ave., New York, NY 10017-6743.

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SANDWICH

MARKET SEGMENT REPORT

Port of Subs offers 18 varieties of submarine sandwiches and 6-ft.-long sandwiches.

Low start-up costs boost unit expansion.

Once viewed as unworthy of serious consideration, the sandwich has been attracting a lot of attention lately. Low start-up costs for sandwich shops have encouraged growth.

One company, Milford, CT-based Subway Sandwiches, has single-handedly brought the sandwich segment into focus with its aggressive expansion. In just a few years, the company has grown to 5,010 units worldwide, 4,800 of those in the U.S. By tne end of 1991, the company expects to have 6,200 units, says president Fred DeLuca.

"There's a lot of growth in the sandwich segment because Subway has opened so many units," admits Tony Conza, president of competitor Blimpie's. "But they paved the way for us. Now we don't have to convince customers to eat a submarine. We just have to convince them to eat a Blimpie."

The segment's growth seems to be fueled at least partly by the customer's perception that sandwiches are a healthy lunch choice. Other factors are at work, as well, points out Atlanta-based Arby's executive vice president of marketing Larry Krueger. "Satiation is a factor. How many times can you eat a burger?" he says. "And until recently, there weren't that many choices, so the availability of sandwiches is a factor. Finally, the consumer's tastes are maturing. He's looking for something different."

But, despite the much-vaunted popularity of sandwiches, a recent CREST study (conducted by the Park Ridge, IL-based NPD Group) that examines consumers' regional food preferences shows that both roast beef sandwiches and submarine sandwiches are among the fastest-declining menu items in the Northeast. By contrast, chicken sandwiches are among the fastest-growing menu items.

And, in the last few years, the number of restaurants specializing in sandwiches other than hamburgers has exploded. The unit growth rate has been so phenomenal, in fact, that some critics say leading sandwich purveyors are in the franchising sales business, not the restaurant business. Only time will tell whether the increased avail-

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By Jacque Kochak

ability of sandwiches at so many small units across America will mean dramatically increased consumption.

LIMITATIONS? Most of the sandwich shop operators are in a completely different business than burger high-rollers like McDonald's and Burger King. They're even in a different business than an Arby's or a Rax, both positioned squarely against mainstream fast-food operators.

While a sandwich shop typically grosses $200,000 to $300,000 a year compared to at least $700,000 for a concept like Rax Roast Beef (and well over $1 million for a McDonald's), the investment is also much smaller. A franchisee can open a Blimpie's, for example, for $80,000. It costs $600,000 to $650,000 for a Rax land and building package.

Such sandwich concepts are not without limitations, however, say critics. "The nice thing about a Subway is that a unit can be opened at a relatively low cost," says Arby's Krueger. "But there is no equipment other than an oven for baking bread, a microwave, and a slicer for meat, so the ability to grow within the same unit is somewhat limited."

The typical sandwich shop's slow service system is also a factor, he says. "If they can make one sandwich every minute, that's 60 sandwiches in an hour's time. We are geared for much higher volume. And most don't have drive-thrus; 35% to 45% of our business is drive-thru."

THE SUBWAY STORY. In the past year, Subway added 1,100 stores, a rate that has been maintained for several years. "Our speed of opening actually seems quite slow to me right now," says president DeLuca. "That's less than a 25% increase in terms of units. In 1987, we started with 991 units and ended the year with 1,810, an 83% increase. That was a tough year, and we had to work hard. Now everything's in place to handle expansion."

Even with Subway's explosive expansion, DeLuca says that he sees room for more. "We still don't have a terribly high density of stores when you look at McDonald's," he says. "We hope to have 8,000 units by 1995."

Subway recently added two new sandwiches to its menu, a seafood and lobster sandwich and a spicy Italian sandwich, made with pepperoni and Genoa salami. Under test is a breakfast program, being offered in about 50 stores. Available are two breakfast sandwiches, one on pita bread and one on a croissant.

Systemwide sales this year reached $1.2 billion, with average unit volumes of about $250,000.

FAST-FOOD ALTERNATIVE. Atlanta-based Arby's is positioned squarely against traditional fast-food operations such as McDonald's and Burger King, and although the company operates fewer units than Subway, systemwide sales topped that company's. The chain doesn't divulge average unit volumes, but they are substantially higher than most sandwich chains.

Arby's 2,360 units posted 1989 systemwide sales of $1.3 billion, a 13% increase over the previous year.

Arby's, which originally built its reputation on a roast beef sandwich, introduced a number of new sandwiches in the last year. In addition to a French

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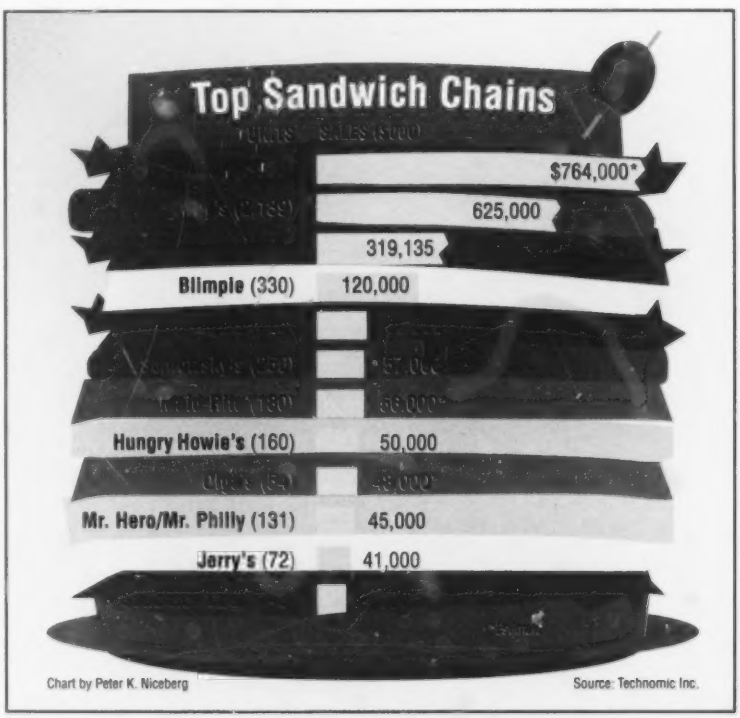
Sandwiches are perceived as a healthier luncheon choice.



dip sandwich and a French dip and Swiss sandwich, Arby's added a line of "classics." The classics, selling for 99 cents, hold a smaller amount of meat but come dressed with a variety of toppings, including bacon.

Promotional offerings have included a double-decker sandwich selling for $1.99 to $2.29, as well as a triple-cheese melt consisting of roast beef on a submarine roll with Swiss cheese, shredded cheddar cheese, and a thick Parmesan cheese sauce. Also made available this year was the Albuquerque Turkey, on a poppyseed bun with a jalapeño mayonnaise dressing. A grilled chicken sandwich will be available in the spring, and a "Golden Hits" promotion scheduled for mid-winter will bring back two old favorites, a bacon cheddar deluxe and a beef and cheddar.

Arby's strategy is to hold the menu to 13 sandwiches, with five or six of those required by franchisees. If any sandwich attracts less than 3% of sales, a franchisee is urged to take it off the menu and offer another selection. "Anything that can be sliced fits into Arby's format," says Krueger. "I think we're fairly well-poised to capitalize on the interest in sandwiches. We've worked for the last four or five years to create an identity as an alternative to the hamburger."

Columbus, OH-based Rax Restaurants Inc. is also in the broad-based sandwich business. The company operates 450 units in about 70 different markets, 70% of them franchised. Total systemwide sales in 1989 topped $350 million, with units averaging $700,000 in sales annually. "In the last year or so, Rax has made the switch from a relatively unfocused position to a main-line fast-food operation offering sandwiches," says Vince Webb, Rax's executive vice president of marketing.

Like many other fast-food operators, Rax has added a "Super Saver" menu of several sandwiches available for under $1.

Included are a bacon cheddar melt with roast beef, Swiss cheese and bacon for 99¢ and a cheddar melt for 89¢. Four or five other sandwiches are under development, all with an ounce and a half to two ounces of meat.

Arby's recently added a new line of French dip sandwiches.

The equipment package for a sandwich shop is fairly simple.

A NEW NICHE? Fort Lauderdale-based Miami Subs is attracting attention because of its new president: Ron Petty, former president of Burger King. Petty says he was attracted to the concept because he believes Miami Subs fills a unique niche, on a scale somewhere between the McDonald's and Burger Kings of the world and the Chili's and TGI Friday's.

Miami Subs offers a broad sandwich menu with everything from hot and cold submarines to gyros, burgers, and broiled chicken breast sandwiches, as well as pita pizzas. Hot wings are also offered, along with a variety of salads and desserts, including frozen yogurt, Key lime pie, and cheesecake.

With Miami Subs, Petty hopes customers will build a kind of brand loyalty. Because the menu is much broader than typical fast food, the customer can eat at a Miami Subs several times a week. Yet Miami Subs offers the convenience, speed, and prices of fast food, with an average check of $5.40, a drive-thru window, and self-service. Everything is prepared to order, using fresh produce and ingredients. Miami Subs units are freestanding, with bright art deco exteriors.

While the current economy is making other operators nervous, Petty sees opportunity. Miami Subs converts failed restaurants at a cost of $150,000 to $250,000. "We've taken over Wendy's units, Rax units, Popeyes units, and

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Brown's Chicken units, and—without exception—we have doubled the volume," says Petty. Annual unit sales average $1 million.

The company now operates 54 units, only eight of them company-owned. Petty projects that by the end of 1990, with the real estate now under contract, the company will be operating 100 restaurants, all of them in Florida. Miami Subs will venture outside of Florida in '91.

ATTRACTING DINNER BUSINESS. One problem for sandwich shops is that their business comes primarily from lunch. Schlotzsky's, a 250-unit sandwich chain based in Austin, TX, has been successfully testing a pizza product to attract dinner customers after 4 p.m.

"The test is going great," says B.J. Rosow, Schlotzsky's vice president of marketing. "We're selling 200 to 250 pizzas a week in units where pizza is being tested."

Four varieties are available: an original, a double cheese and pepperoni, a vegetarian and a cheese pizza. The crust is made out of the same sourdough bread base that is baked fresh daily in the units for sandwiches.

Schlotzsky's, founded in 1971, serves a round sandwich based on New Orleans' distinctive muffaletta. The hot sandwich is stuffed with three meats, three cheeses, lettuce, tomato, mustard, black olives, and onions.

The largest number of Schlotzsky's units are clustered in Texas, with others concentrated in Las Vegas, Albuquerque, and throughout the Southeastern U.S. For the next several years, Schlotzsky's will probably open 50 units a year, about 75% of those franchised, says Rosow.

New York City-based Blimpie's has been going through measured changes recently, in preparation for a major expansion push. The company, which operates some 400 units in 21 states, had diversified into full-service restaurants in the 1980s, says president Tony Conza. Called Border Cafes, all the full-service units but one in Manhattan have now closed.

Blimpie's main vehicle for expansion is subfranchises. "In the past year, we've gone from 16 area developers to 32 in different parts of the country. In practice, they are our partners in the areas, and share in all revenues," says Conza. Conza projects that 50 area franchisees will be signed by the end of next year, and they will be committed to opening 300 new units a year.

Blimpie's sells both hot and cold sandwiches served on Italian bread, as well as salads. The company started baking its own bread six months ago, and all new stores are equipped with bread-baking facilities. Last year, Blimpie's added pita bread sandwiches to its menu. This "Lite" menu offers sandwiches at under 300 calories apiece. The company also has added a meatball sandwich and a steak-and-cheese sandwich.

The cost to open a Blimpie's runs about $80,000, says Conza. Emphasis is on renovating existing sites.

Many chains now bake their bread on premise.

Blimpie's average unit volumes are about $320,000, but Conza cautions that a large number of New York City units bring that total up. Systemwide sales reached $120 million for 1989.

Hamilton, OH-based Great Steak & Fry Co., owned by Nicor Management, has carved out a position for itself as the leading purveyor of Philly cheesesteak sandwiches. By the end of the year the company will be operating 84 units, 32 of them opened this year.

Next year, however, president Nick Lanni predicts that growth will be

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Great Steak & Fry specializes in Philly cheesesteak sandwiches.

much more conservative. "We'll nurture the ones that we have already opened," he says. The Great Steak is a cheesesteak sandwich prepared with thinly sliced steak, provolone cheese, grilled onions, lettuce, tomato, and mayonnaise; it is available half or whole. The Super Steak adds mushrooms and green peppers. Also available are grilled ham sandwiches, a Veggie Delight, and a Chicken Philadelphia.

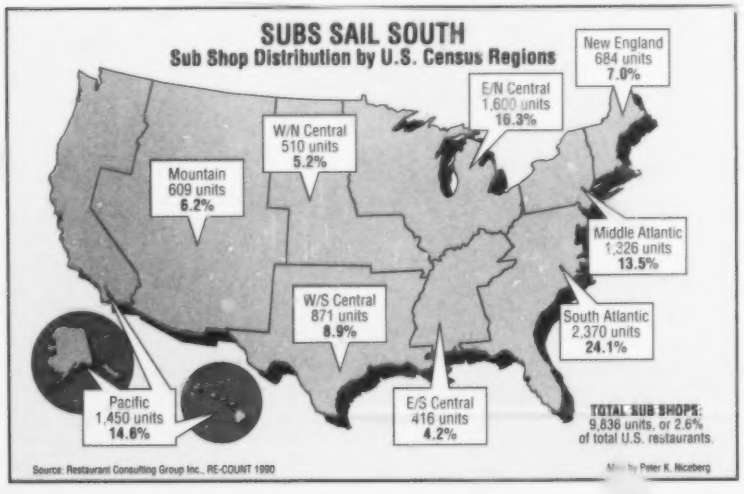
The company recently introduced salads with hot toppings such as stir-fried sirloin, turkey, chicken, and ham. Prices range from $2.60 to $3.10. Under test is a breakfast menu, using the same ingredients as in the cheese-steak sandwich, mixed into an omelet base, and folded into a toasted bun. Debuting soon is a children's meal priced under $2, including a mini cheesesteak sandwich. Great Steak & Fry units post average unit volumes of $450,000 on an investment of about $150,000, says Lanni.

West Bridgewater, MA-based D'Angelo's Sandwich Shops, with more than 140 units in the Northeast, is unusual because unit volumes approach $600,000—much higher than most other sandwich concepts. Part of the reason is the breadth of the menu, with almost 50 selections available.

The menu runs the range from cold deli sandwiches to hot grilled sandwiches, such as steak and peppers or burgers. Salads range from an antipasto salad with slices of Genoa salami, ham, provolone cheese, and black olives to a Greek salad with feta cheese. "Pokket" sandwiches, made with baked-on-premise pita bread, were added several years ago. These sandwiches are filled with seafood or meat; a vegetarian pokket, served with grilled green peppers, fresh mushrooms, onions, and melted cheese is also offered.

Most D'Angelo's units share the premises with Chip's Ice Cream, which is staffed by the sandwich chain's crew and contributes additional revenues during off hours. D'Angelo's originally teamed up with Steve's Ice Cream, and that choice is still available to franchisees. Steve's Ice Cream doesn't offer frozen yogurt, however, so D'Angelo's developed Chip's, specializing in hard-pack frozen yogurt. D'Angelo's 2,400-sq.-ft. units are almost always located in strip shopping centers. They are preparing to expand outside of its New England base, down to Virginia.

A Midwestern chain, Omaha-based Little King Restaurant Corp., operates



The segment may already be getting saturated.

100 units and is planning aggressive expansion in the next few years. "Subway is way ahead, but there's a lot of room for a strong number-two or number-three sandwich chain," says executive vice president Dave Potter. "Only so many chains can go national, and we want to be part of that top five. The window of opportunity will only be open for a few years."

The company has just hired a new vice president of franchising and is concentrating on signing area developers in the Midwest and on the West Coast.

Little King's signature sandwich is a submarine on fresh-baked Italian or whole wheat bread. The units also sell soups, chili, and pizza whole or by the slice. The company's newest menu addition is a Philly beef and cheese. Made in the microwave, the sandwich is aimed at increasing dinner business.

Little King has recently begun downsizing unit interiors and adding drive-thrus to end-bays in strip shopping centers. Potter says that average unit volumes vary from $250,000 to $350,000.

Reno, NV-based Port of Subs, with 51 units open in the West, is moving cautiously. "Our emphasis is on increasing average unit volumes rather than on growing fast," says CEO John Larsen. Another 62 units are under contract to open, but after that, the expansion rate will slow. The 1,200-sq.-ft. to 1,400-sq.-ft. units are located in strip centers. The menu offers 18 varieties of sandwiches on bread that is baked on premise. Prices range from $2.75 to $4.95. Average unit volume is $255,000, says Larsen. The company has seen real growth of 3% to 4% over the previous year.

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On the West Coast, a company called Seawest Subs, based in Bellevue, WA, is expanding rapidly with small sandwich shops located primarily in strip shopping centers.

The first Seawest Sub was opened in 1980 by a former social worker, Bernie Kane. By 1985, his one shop had grown to 39 units. That year, he teamed with Jim Iseman, the current president, to form a new company expressly to franchise the concept. That new company, Seawest Sub Shops Inc., has overseen the opening of 73 franchised units, with another seven under construction and deposits obtained for an additional 43 units. Most of the shops are in Washington and Oregon, although a few are scattered as far away as Florida, Ohio, Illinois, and Massachusetts.

The shops sell a selection of deli-style sandwiches in three sizes, ranging up to a 2-lb. Destroyer. Hot sandwiches are also served, heated in a warmer. Cookies are baked in the store, and soups and salads are served. The stores emphasize take-out, so the blue, gray, and red units typically offer only 12 to 15 seats. Size of the stores is usually no more than 1,000 sq. ft., with strip center locations preferred.

Seawest Subs is notable because of unusually low startup costs. Typically, $45,000 to $65,000 is necessary to open a store, which includes a franchise fee of $15,000. Because the stores occupy small spaces, rent is often no more than $1,000 a month.

The franchising company's annual fee is also less than is usual, with a flat fee of $2,000 per unit charged the first year, $3,000 per unit the second year, and $4,000 through the tenth year.

THE FUTURE. There's no way to tell if all the proliferating sandwich concepts will succeed, but the public is certainly starting to notice sandwiches as a reasonable lunch choice.

"The broadly defined sandwich segment is where the growth is happening," says Rax Restaurant's Vince Webb. "People are actively looking for an alternative to the fast-food hamburger, but there is no decline in the need for convenience and value. I feel that chains with a variety of sandwiches are positioned well today." **RB**

Customers are looking for an alternative to hamburgers.

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